

ABSTRACT

- 5 The present invention is a graphical user interface within the context of a financial planning and management system and method. The model consists of a user intention modeling module and an investment planning module. The graphical user interface displays a model and many of its related characteristics simultaneously and allows the user to interactively manipulate the model by selecting various function and mode icons.
- 10 Furthermore, the user may accesses both a live advisor and an automated coach through the graphical user interface by selecting one of several communication icons.